UNITED STATES DEPARTMENT OF AGRICULTURE
Farm Service Agency
Washington, DC 20250

For: State and County Offices

Management of Agricultural Credit (MAC) Automated System for Use With Workload Counts

Approved by: Acting Deputy Administrator, Farm Loan Programs

[signature]

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1 Overview

A
Background

BUD will use MAC workload scheduling item codes to capture certain FLP unit counts for second quarter work measurement and mid-year workload reporting.

B
Purpose

This notice:

- requires applicant/borrower data to be entered into MAC

- requires the standardized Workload Scheduling (WLS) codes in MAC, those created by the National Office, to be used

- provides information on the data elements and WLS codes in MAC that BUD queries to capture work measurement and workload units as of March 31 and September 30 of each fiscal year.

C
Contacts

Direct questions about:

- this notice to Kathleen Miller, LMD at 202-720-1643

- work measurement or workload queries to Heidi Ware or Vicki Larson, BUD at 202-720-4483.

Disposal Date	Distribution
March 1, 2003	State Offices; State Offices relay to County Offices

2   Workload Items and MAC Data

A
Guaranteed
Loan System
(GLS) Download
to MAC

The recent GLS download into the MAC system has created several problems which could affect workload counts for items 901-905.

Before running the workload queries, all FLP offices shall:

- print the application report "8. All Farm Loan Programs Guaranteed" for fiscal year 2002 from the MAC reports section

- review the report for accuracy.

Due to problems with the GLS download, the following problems may need to be addressed through the MAC Menu.

IF...	THEN...
fictitious or missing loan closing date and/or incorrect eligibility date	• add the leading zero to the lender ID • ensure that the eligibility date is correct • ensure that the assistance type code is the same as entered into GLS • complete the loan processing information if it was not downloaded correctly and the application has been approved • complete the closing information if the loan has closed.
duplicate applications	delete the MAC-entered application and correct the application that was downloaded from GLS, since the downloaded application was assigned an internal identifier for future downloads.
no errors are found	no action needs to be taken. The queries will work accurately.

Note: Since there will be no additional GLS downloads for an unspecified time, all guaranteed applications MUST be entered through MAC for the workload queries to capture the information.

2   Workload Items and MAC Data (Continued)

**B
MAC Data
Information**   The following MAC data elements and WLS codes are counted by BUD's
FY 2002 workload item queries as follows.

Work Item	Description	Data Element/WLS Code	MAC Screen
801	Loan Application Received For All Direct Farm Loan Programs **Note:** Includes nonprogram loan applications, such as SAP.	*Date Received* is entered *Direct/Guar* = "D"	UAA20601
802	Program Eligibility Determinations for Direct Loan Applications **Note:** Every eligibility determination is counted for each application.	*Eligibility Decision Dt1, Dt2,* and/or *Dt3* is entered *Action Description 1, 2, 3* = "E" or "R" *Eligibility Decision/ Description* are blank, but *Final Disposition Action* = "W" *Direct/Guar* ="D" *Fund Code* not = "43"	UAA20601
803	Loss Calculation and Test for Credit for EM Loan Eligibility Determinations	Same as 802 except *Fund Code* = "43"	UAA20601

Continued on the next page

2   Workload Items and MAC Data (Continued)

A
MAC Data
Information
(Continued)

Work Item	Description	Data Element/WLS Code	MAC Screen
804	Loan Feasibility Determinations for Direct Loans Except Lo Doc Loans **Notes:** This item has been changed for FY 2002 to exclude lo-doc loans. Every disposition is counted for each application. This includes final disposition, final disposition after appeal or other final disposition (used mainly with reinstated applications).	*Final Disposition Date, Fnl Disp Date After Appeal,* and/or *Other Disp Date* is entered and *Final Disposition Action, Fnl After Appeal,* and/or *Other Final Disposition* = A, R or W and *Action Description 1, 2 or 3* equals "E" *Direct/Guar* = "D" *Lo Doc Loan* = "N" or blank	UAA20601 UAA20602
805	Loan Closing for All Direct Loans	*Closing Date* is entered *Direct/Guar* = "D"	UAA21005 - New loan funds UAA21010 - Credit Sale UAA21315 Assumption

2   Workload Items and MAC Data (Continued)

A
MAC Data
Information
(Continued)

Work Item	Description	Data Element/WLS Code	MAC Screen
806	Loan Feasibility Determinations for Lo Doc Loans **Note:** This is a new Workload Item for FY 2002. It is very important to enter "Y" in the MAC Lo Doc Loan field for every lo doc loan application. You may go back in MAC and add "Y" for lo doc loans with feasibility determinations in FY 2002 before the field existed in MAC.	Same as 804 except *Lo Doc Loan* = "Y"	UAA20601 UAA20602 (Location of *Lo Doc Loan* field)
821	Routine Loan Servicing for All Direct Loan Borrowers **Note:** This is a count of all unduplicated direct borrowers who have at least 1 loan outstanding as of March 31. The borrower is counted if the outstanding loan payoff date (LPYOFD) is absent or greater than March 31, the loan amount (LONAMT) is greater than zero and the original loan date (ORLNDT) is equal to or less than March 31 of the current fiscal year. This unit is counted once annually.	MAC's LND database. Database fields: LPYOFD (loan payoff date), LONAMT (loan amount), and ORLNDT (original loan date)	Reports from Main Menu Screen UAA90001, Undupli-cated Borr Caseload UAA99900, Print Report
822	Financial Analysis and Specialized Direct Loan Servicing Activities **Note:** There is a maximum of 1 count per borrower per fiscal year.	Number of completed *WLS 4025*	UAA70010

2   Workload Items and MAC Data (Continued)

A
MAC Data
Information
(Continued)

Work Item	Description	Data Element/WLS Code	MAC Screen
823	Field Visits for Direct Loan Servicing Activities **Notes:** If completion dates are the same for any of the listed WLS items, then only 1 count is made. If a YEA is completed during a field visit, enter WLS 4025 (counted in Item 822) and a field visit code, such as WLS 4005 and it will be counted in this item.	Number of completed *WLS 2004, 2005, 2015, 2050, 4005, 4065, 4070, 4071, and 4075*	UAA70010
824	1951-T Servicing Action **Note:** This is a count of each borrower being sent a 1951-T letter.	Manual count	
825	1951-S Servicing Action **Note:** This is a count of each borrower being sent a 1951-S servicing package.	Number of completed *aocodes CBS301, CBS315, CCS301, CES301, CGS304, and LTS301*	UAA36201 UAA36204 UAA36205

2   Workload Items and MAC Data (Continued)

**A
MAC Data
Information
(Continued)**

Work Item	Description	Data Element/WLS Code	MAC Screen
826	Subordination of Chattel Security	*Request Type* = "S" *Request Date* is entered *Application Completed Date* is entered *Final Disposition Date* and/or *Final Disposition Date After Appeal* is entered *Final Disposition Action* and/or *Final Disposition After Appeal* = A, R, or W.	UAA35205
827	Real Estate Subordinations, Partial Releases, and Consent Activities	Same as 826 except *Request Type* = B, P, or C	UAA35205
828	Servicing Shared Appreciation Agreements	Manual count	
829	Inventory Property Management	Manual count	
830	All Debt Settlement Activities	Number of completed *aocodes CLW306, outcomes 1, 4, and 5* *CLW307 outcome 1* *CEPS301 outcome 1*	
901	Loan Applications Received for Guaranteed Farm Loan Programs Except PLP	Same as 801 Except *Direct/Guar* = "G" *Lender Status Code* not = "P"	UAA20601

2   Workload Items and MAC Data (Continued)

**A
MAC Data
Information
(Continued)**

Work Item	Description	Data Element/WLS Code	MAC Screen
902	Program Eligibility Determinations for Guaranteed Loan Applications Except PLP	Same as 802 Except *Direct/Guar* = "G" *Lender Status Code* <u>not</u> = "P"	UAA20601
903	Loan Feasibility Determinations for All Guaranteed Loans Except PLP	Same as 804 Except *Direct/Guar* = "G" *Lender Status Code* <u>not</u> = "P" No check on *Lo Doc Loan* field	UAA20601
904	Loan Closing for Guaranteed Loan Programs Except PLP	Same as 805 Except *Direct/Guar* = "G" *Lender Status Code* <u>not</u> = "P"	UAA20601 UAA22004/ UAA22005
905	Preferred Lender Program Guaranteed Loan Processing **Note:** Count of each guaranteed farm loan request received from a preferred lender.	Same as 901 Except *Lender Status Code* = "P"	UAA20601
921	Routine Guaranteed Loan Servicing and Maintaining Lender Records **Note:** Count of each guaranteed loan borrower.	Manual count	
922	Feasibility Determinations for Guaranteed Loan Servicing Activities	Manual count	

2   Workload Items and MAC Data (Continued)

**A
MAC Data
Information
(Continued)**

Work Item	Description	Data Element/WLS Code	MAC Screen
923	Guaranteed Loan Servicing - Lender File Reviews for SEL and CLP	Number of completed *WLS 4035* when *Lender Status Code* not = "P"	UAA20601 UAA70010
924	Guaranteed Loan Servicing - Lender File Reviews for PLP	Same as 923 Except **Lender Status Code** = "P"	UAA20601 UAA70010
925	Servicing Guaranteed Loan Borrowers Through Liquidation or Bankruptcy and Processing Loss Claims	Manual count	
1001	Banking and Collections for All Loan Programs	Count of SCOAP payments on System A36/AS400 in addition to manual counts	
1002	Real Estate Appraisals Performed by FSA Employees	Number of completed *WLS 4062*	UAA70010
1003	Chattel Appraisals Performed by FSA Employees	Number of completed *WLS 4060*	UAA70010
1004	Reviewing Real Estate Appraisals Performed by Lenders, Contract Appraisers, or Third Parties for Direct or Guaranteed Loan Making or Servicing	Number of completed *WLS 5002* and *WLS 4077*	UAA70010
1005	Reviewing Chattel Appraisals Performed by Lenders, Contract Appraisers or Third Parties for Direct or Guaranteed Loan Making and Servicing	Number of completed **WLS 4061 WLS 4078**	UAA70010

3   Manual Count Adjustment

A
MAC Move
Software

The MAC Move software has been beta tested and will be implemented after:

- SCIMS is operational
- personnel who enter MAC data are trained on SCIMS.

It is important to note that if a County Office has transferred files to another County Office, MAC data will still reside in the original County Office until the data is moved by the MAC Move software.

BUD will issue a future notice with information for FY 2002 Midyear Queries. It will be necessary to follow instructions in this notice. This notice will contain information on how to:

- submit a request to move query counts to another office

- request adjustments to unit counts for work items that require manual counts in addition to the query count. Also, all employees should read the Q&A's and other query information found on the Work Measurement and Workload Forum and Budget Website - Work Measurement/Workload homepage at: http://www.fsa.usda.gov/dam/bud/bud1.htm.

4   Action

A
SED Action

SED's will ensure that all:

- data listed in this notice that is counted for workload is entered in MAC on the System A36/AS400 by the appropriate Field Offices

- National Office-created WLS codes are used by Field Offices to the extent possible to track their work.